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Men's Tailored Clothing/ Separates and Rainwear

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Market Research Division
Fairchild Publications, New York

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Men's Tailored Clothing/ Separates and Rainwear

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E.B. Gold, Manager
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MEN'S TAILORED CLOTHING, SEPARATES AND RAINWEAR

Market Trends

The poor performance which has been registered by the $7 billion men's tailored clothing industry in recent years is expected to continue through 1981. In a recent financial meeting, a spokesman for Kurt Salmon Associates predicted that suits, which declined by 12% in 1980 would fall another 2% in terms of unit sales in 1981.

Tailored separates, however, are faring better. Jacket sales are expected to rebound from a 10% decline in 1980 and show a 3% rise this year. Slacks, the only reported category to show a rise in 1980 (3%), are expected to do even better in 1981, registering a 5% gain. Overall, this year is expected to be better than 1980.

The look and strategy involved in the men's tailored clothing field is undergoing rapid change. Increasingly, the target market for these clothes is the steadily growing, older segment of the population, the career man, especially the 35-49 year old bracket. By the year 2000, it is expected that this age group will be 64.6% larger than in 1980 and represent 23.3% of the total population. Many of the men in this group are changing their apparel buying habits to include more sophisticated, dressier clothing to fit new lifestyles and jobs. No longer are they content to wear jeans and sportswear for all occasions.

Retailers are changing their merchandise mix to accommodate their customers whose apparel buying habits are also being affected by inflationary/recessionary pressures. In a recent study it was reported that nearly 60% of all men's suits sales occur when promoted at off-price. No longer are the consumers exclusively buying the traditional "business suit" but are moving increasingly toward lower priced, highly versatile tailored separates. Tailored separates are expected to be the growth area for this industry in the future.

Imports continue to make gains in the men's tailored wear area, registering a 10.4% gain in units and a 5.6% rise in dollars in 1980 versus 1979. The top four exporters of this apparel to the U.S., all Far Eastern countries, accounted for over 53% of imports last year.. Exports, on the other hand, skyrocketed to a 115.0% increase in unit volume and a 17.2% jump in dollar terms. This increase can partially be attributed to a weak U.S. dollar abroad which lowered the relative costs of these goods and made them competitive with their foreign produced counterparts.

Rainwear appears to be slowly recovering from poor performances which it registered in 1979 and 1980. Retailers though, are being extremely conservative with their purchases until it becomes apparent which way this cyclical is headed. Imports, a major factor in this market, declined in 1980 on both a unit and dollar volume basis when compared to 1979. The 27.4 million dozen imported in 1980 was 16.2% lower than in 1979 while the $9.5 million accounted for by these imports was 11.1% less than the $10.7 million registered in the previous year.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on men's wear at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years between the complete census of manufacturers which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

Data on men's tailored clothing industries and on waterproof outer garments, as classified in the Census Bureau reports, are summarized in the following tables.

Census Bureau data track the continued downtrend in the tailored clothing industries. By 1977 the number of plants primarily producing men's suits or coats showed a drop of almost 14% compared with 1972. Plants producing separate trousers declined almost 18%, from 624 in 1972 to 514. In the waterproof outer garment industry, which includes plants producing women's as well as men's rainwear, etc., the number of plants dropped 35% in the five year period.

Men's & Boys' Suits & Coats (SIC 2311*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	618	721	--	- 14.3%
Number of establishments**	na	737	856	--	- 13.9
Employees, total (thous.)	97.8	98.7	124.8	- 0.9%	- 20.9
Production workers (thous.)	85.4	86.2	108.3	- 0.9	- 20.4
Payroll (mil. $)	$ 853.0	$ 822.2	$ 770.3	+ 3.7	+ 6.7
Value added by manufacture# (mil. $)	$1,534.2	$1,574.4	$1,342.2	- 2.5	+ 17.3
Value of shipments## (mil. $)	$2,653.0	$2,767.5	$2,396.9	- 4.1	+ 15.5
Capital expenditures, new (mil. $)	25.9	25.8	22.5	+ 0.4	+ 14.7

Men's & Boys' Separate Trousers (SIC 2327*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	405	463	--	- 12.5%
Number of establishments**	na	514	624	--	- 17.6
Employees, total (thous.)	65.7	70.9	91.3	- 7.3%	- 22.3
Production workers (thous.)	58.0	61.9	81.8	- 6.3	- 24.3
Payroll (mil. $)	$ 469.8	$ 474.0	$ 439.3	- 0.9	+ 7.9
Value added by manufacture# (mil. $)	$ 983.0	$ 845.6	$ 784.9	+ 16.2	+ 7.7
Value of shipments## (mil. $)	$1,946.6	$1,718.0	$1,745.0	+ 13.3	- 1.5
Capital expenditures, new (mil. $)	26.6	22.8	22.2	+ 16.7	+ 2.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Waterproof Outer Garments (SIC 2385*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	155	236	--	- 34.3%
Number of establishments**	na	167	257	--	- 35.0%
Employees, total (thous.)	12.0	12.0	15.4	nc	- 22.1
Production workers (thous.)	10.4	10.1	13.2	+ 3.0%	- 23.5
Payroll (mil. $)	$ 91.5	$ 89.4	$ 86.4	+ 2.3	+ 3.5
Value added by manufacture# (mil. $)	$ 191.9	$ 194.4	$ 168.8	- 1.3	+ 15.2
Value of shipments## (mil. $)	$ 373.7	$ 348.8	$ 332.1	+ 7.1	+ 5.0
Capital expenditures, new (mil. $)	1.6	5.6	2.4	- 71.4	+133.3

na = not available
nc = no change
(r) = revised

*Manufacturers are classified by industry under the Standard Industrial Classification system (SIC) determined by the principal product made, as shown below:

SIC 2311 comprises establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sport coats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

SIC 2327 comprises establishments primarily engaged in manufacturing men's, youth's and boys' separate slacks and trousers.

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). The total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered on page 17 for the latest year available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings

Current information on employment in segments of the men's and boys' tailored wear industry is published by the U.S. Bureau of Labor Statistics. Production worker employment in men's and boys' suits and coats averaged 68,800 workers in 1980, down 8.1% from 74,900 in 1979. The Bureau reported 78,700 people employed in the men's and boys' suits and coats segment of the industry. This figure is down 9.1% from the total of the previous year.

In the men's and boys' separate trousers area, production worker employment averaged 69,200 workers in 1980 against 68,900 in 1979. This is a reduction of 0.4%. Total employment in this segment remained static between 1979 and 1980 at 79,300 people.

Employment and Earnings in Selected Men's & Boys' Tailored Wear Industries, 1979, 1980
(Annual Averages)

	1980	1979	% Change 1980/1979
Men's & boys' suits & coats:			
All employees (thous.)	78.7	86.9	- 9.4%
Production workers (thous.)	68.8	74.9	- 8.1
Average weekly earnings	$192.60	$180.58	+ 6.7
Average weekly hours	36.0	35.2	+ 2.3
Average overtime hours	0.8	0.6	+33.3
Men's & boys' separate trousers:			
All employees	79.3	79.3	nc
Production workers	69.2	68.9	+ 0.4%
Average weekly earnings	$149.14	$139.65	+ 6.8
Average weekly hours	35.4	35.0	+ 1.1
Average overtime hours	0.9	0.8	+12.5

nc = no change

Source: U.S. Bureau of Labor Statistics, Employment and Earnings, March issues 1980, 1981.

Concentration in the Industry

Following the general trend in the apparel industry, men's tailored wear industries have been consolidating into fewer but larger companies.

The total number of plants in the men's and boys' tailored wear and waterproof garment industries declined 5.3% between 1972 and 1977 to 1,401 establishments. The sharpest drop in manufacturing facilities was registered by the waterproof outer garment segment which declined 35.0% from 257 units in 1972 to 167 in 1977. Less drastic declines of 13.9% and 17.6% were marked by the suits and coats, and the separate trouser segments which went from 856 and 624 facilities to 737 and 514, respectively, between 1972 and 1977.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment in the men's tailored clothing industries is highly concentrated in the larger plants. In 1977, in the men's suit and coat industry, only 16.0% of all establishments had over 250 workers, yet they employed 62.0% of the industry's work force. In the separate trouser segment, plants with 250 or more employees represented only 15.9% of the industry total and accounted for 61.2% of employment during the same year. The waterproof outer garment segment was less concentrated. In this industry 6.0% of the plants, represented by those with 250 or more employees, accounted for 38.3% of employment during 1977.

In 1980, 91% of total shipments were accounted for by plants with 100 or more employees in the men's and boys' suit and coat industry. The men's and boys' trouser segment had 94% of its shipments credited to the same size plants while the waterproof outer garment area showed a slightly lower 79% concentration of shipments from plants with 100 or more employees during the same period.

The Men's Tailored Wear Industries by Employment Size, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil.$	%
Men's & boys' suits & coat industry, total	737	100.0%	96,700	100.0%	$822.2	100.0%
By establishment size:						
Under 10 employees	196	26.6	600	0.6	5.7	0.7
10-49	180	24.4	4,700	4.9	41.0	5.0
50-249	243	33.0	31,400	32.5	244.5	29.7
250 or more	118	16.0	60,000	62.0	531.0	64.6
Separate trouser industry, total	514	100.0%	70,900	100.0%	$474.0	100.0%
By establishment size:						
Under 10 employees	125	24.3	300	0.4	11.8	2.5
10-49	116	22.6	2,700	3.8	20.3	4.3
50-249	191	37.2	24,500	34.6	156.8	33.1
250 or more	82	15.9	43,400	61.2	285.0	60.1
Waterproof outer garment industry, total	167	100.0%	12,000	100.0%	$ 89.4	100.0%
By establishment size:						
Under 10 employees	38	22.8	100	0.8	0.9	1.0
10-49	73	43.7	1,900	15.8	15.7	17.6
50-249	46	27.5	5,400	45.0	39.1	43.7
250 or more	10	6.0	4,600	38.3	33.8	37.8

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC77-1-23A, MC77-1-23D.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments of Men's Tailored Wear Industries in Large Plants, 1977-1980

	Number of Plants		% of total shipments accounted for by plants with 100+ employees
	With 20+ Employees	With 100+ Employees	
Men's & boys' suits & coats (SIC 2311*)			
1980	461	273	91%
1979	517	309	91
1978	517	315	92
1977	502	317	92
Men's & boys' separate trousers (SIC 2327*)			
1980	411	303	94%
1979	461	323	92
1978	472	335	93
1977	466	348	94
Waterproof outer garments (SIC 2385*)			
1980	114	46	79%
1979	123	48	79
1978	118	49	81
1977	106	46	80

*For definitions of SIC numbers, see page 3.

Source: Sales & Marketing Management, "Survey of Industrial Buying Power," 1978, 1979, 1980, 1981 editions. (All rights reserved.)

Operating Ratios

Key Business Ratios in the Men's Tailored Wear Industries, 1980
(Median Results)

	Men's & Boys' Suits & Coats	Men's & Boys' Separate Trousers	Waterproof Outerwear
Number of manufacturing firms reporting	135	92	28
Current assets to current debt (times)	2.03	2.00	2.01
Net profits to net sales (percent)	2.43	1.69	0.71
Net profits to net worth (times)	12.67	13.03	15.83
Net sales to net worth (times)	4.87	5.45	5.13
Net sales to net working capital (times)	5.26	5.56	5.33
Average collection period (days)	40	41	50
Net sales to inventory (times)	5.6	5.9	8.5

Source: Dun & Bradstreet, Inc. Business Economics Division, 1980 Key Business Ratios (All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

By Leading States

New York State accounted for the major share of industry plants in 1977 with 23.9% of the total, followed closely by Pennsylvania and Massachusetts which represented 13.9% and 6.5%, respectively. Combined, these three states contained 628 of the industries 1,418 plants.

Pennsylvania is the leading state in employment, with 27,200 employees or 15.0% of the industries 181,600 workers. This is due to the fact that Pennsylvania has a higher proportion of large plants than in New York, which ranks second in employment with 25,100 workers (13.8%).

Men's Tailored Wear Industries
By Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Total (Thous.)	% of Total
Men's & boys' suits & coats (SIC 2311*)				
Total U.S.	737	467	98.7	100.0%
New England				
Massachusetts	62	39	na	na
Rhode Island	3	3	0.3	0.3%
Connecticut	4	3	0.3	0.3
Middle Atlantic				
New York	174	82	15.4	15.6
New Jersey	41	28	4.8	4.4
Pennsylvania	139	103	22.2	22.5
North Central				
Minnesota	12	10	0.7	0.7
Ohio	15	5	4.2	4.3
South Atlantic				
Maryland	33	22	4.0	4.1
Georgia	27	26	6.8	6.9
Florida	14	8	1.0	1.0
South Central				
Kentucky	13	13	4.0	4.1
Tennessee	21	17	5.3	5.4
Texas	18	12	2.5	2.5
Pacific				
California	48	13	2.2	2.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Leading States

Men's Tailored Wear Industries
By Leading States, 1977
(continued)

	Number of Establishments		Employees	
	Total	20 or more Employees	Total (Thous.)	% of Total
Men's & boys' separate trousers (SIC 2327*)				
Total U.S.	514	335	70.9	100.0%
New England				
Massachusetts	16	8	0.9	1.3
Middle Atlantic				
New York	103	33	7.8	11.0
New Jersey	13	5	na	na
Pennsylvania	53	42	4.8	6.7
North Central				
Ohio	8	6	0.8	1.1
Missouri	18	13	2.3	3.2
South Atlantic				
Maryland	14	8	0.5	0.7
Virginia	9	7	1.9	2.7
Georgia	58	56	9.5	13.4
Florida	13	8	1.0	1.4
South Central				
Tennessee	21	15	5.8	8.1
Alabama	27	27	5.4	7.6
Mississippi	23	17	4.5	6.3
Arkansas	12	12	3.2	4.5
Louisiana	13	11	2.7	3.8
Texas	25	19	10.6	15.0
Pacific				
California	41	15	2.0	2.8
Waterproof outer garments (SIC 2385*)				
Total U.S.	167	105	12.0	100.0%
New England				
Massachusetts	14	10	0.8	6.6
Middle Atlantic				
New York	62	37	1.9	15.8
New Jersey	18	14	1.0	8.3
Pennsylvania	5	3	0.2	1.7
South Atlantic				
Maryland	11	10	3.3	27.5
Georgia	10	8	0.9	7.5
South Central				
Alabama	3	3	0.5	4.2

(footnotes continued on next page)

GENERAL STATISTICS ON THE INDUSTRY

By Leading States

*For full definitions of SIC numbers, see page 3.
na = not available.
States with information withheld due to disclosure are not shown.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23A,
MC77-1-23D.

PRODUCTION

Reports on a monthly industry survey conducted by the Census Bureau covering a sample of manufacturers indicate that cuttings of men's suits in U.S. plants in 1980 dropped about 9% below the 1979 total. Output of dress and sport coats, however, showed an increase of about 25%; cuttings of men's trousers declined 1.6%, according to survey data which is subject to revision when the Bureau issues the annual Current Industrial Report on apparel.

Cuttings of all types of men's tailored wear items (not including rainwear) covered in the latest annual report totaled 164.6 million units in 1979, advancing slightly less than 1% over the 1978 total.

Separate vests, excluding sweater vests, showed the greatest gain in production in 1979, up 11.8% to 5,100,000 units. Suit-type dress and sport coats registered the second largest jump in production by climbing from 14,966,000 units in 1978 to 15,603,000 in the following year, a 4.3% increase. The largest category, separate dress and sport trousers, (75.7% of total reported production), rose 1.7% during this period to 124,688,000 units.

Men's overcoats, topcoats, and tailored suburban and car coats registered the largest decline in production between 1978 and 1979, a 30.9% fall to 3,317,000 units. Cuttings of tailored suits fell to 15,935,000 units, a 9.1% drop compared with 1978. Output of all rainwear was down almost 25%.

(continued)

PRODUCTION

Production of Men's Tailored Clothing & Rainwear (Men's & Boys')
in the U.S., 1979, 1978
(In Thousands of Units)

	1979	1978	% Change 1979/1978
Tailored clothing, total	164,643	164,490	+ 0.9%
Suits, including uniforms	15,935	17,526	- 9.1
Overcoats, topcoats & tailored suburban & car coats, including uniform	3,317	4,801	-30.9
Tailored suit-type dress & sports coats, including uniform	15,603	14,966	+ 4.3
Separate vests, excluding sweater vests	5,100	4,536	+12.4
Separate dress & sport trousers, including uniform	124,688	122,661	+ 1.7
Raincoats (men's & boys'), including plastic	3,672	4,874	-24.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

Explanation of Terms:

Tailored suits—include formal suits and tailored uniforms. Exclude casual suits, ski and snow suits and boys' suits.
Overcoats, topcoats, tailored suburban, car and stormcoats—include only tailored items, including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats. Excludes raincoats.
Tailored suit-type sportcoats and jackets—include only tailored separate suit-type coats, including tailored uniform and separate formal jackets.
Separate dress and sport trousers, including uniform—include all pants except jeans, jean-cut casuals, dungarees and work pants.
Raincoats—include waterproof outercoats and water-repellent coats of cotton and man-made fibers, including uniform. Wool and chiefly wool water-repellent coats are included under overcoats, topcoats, etc.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

The annual Current Industrial Report summary for 1979 showed production of men's tailored wear items by price line and by fabric construction based on manufacturers reporting in this detail. Since the number of manufacturers supplying the break-downs by price and fabric varies from year to year, comparisons must be used with caution, to indicate a general trend rather than a measure of actual gains or losses.

PRODUCTION

By Price Line

Production of Men's Tailored Wear by Factory (Wholesale) Price Line, 1978, 1979

	1979	1978	Percent Change in Units 1979/1978
Tailored suits, including uniforms (thous. of units)	15,935	17,526	- 9.1%
Percent:	100.0%	100.0%	
Under $50.00	18.1	22.1	-25.3
$50.00 - $62.49	25.5	24.9	- 7.0
$62.50 - $99.99	35.4	26.5	+21.4
$100.00 - 149.99	14.4	16.4	-20.6
$150.00 & over	3.1	2.3	+21.2
Price unspecified	3.5	7.7	-52.6
Suit-type dress and sports coats (thous. of units)	15,603	14,966	+ 4.3
Percent:	100.0%	100.0%	
Under $24.00	10.9	18.6	-38.8
$24.00 - $37.49	34.8	36.2	nc
$37.50 - $44.99	9.7	6.1	+65.2
$45.00 - $57.49	10.6	9.0	+26.0
$57.50 - $62.49	3.0	3.8	-16.9
$62.50 & over	18.3	16.7	+14.2
Price unspecified	12.4	9.6	+35.3
Dress & sport trousers, (thous. of units)	124,688	122,661	+ 1.7
Percent:	100.0%	100.0%	
Under $5.00	4.9	4.9	+ 1.2
$5.00 - $8.99	35.3	37.3	- 3.9
$9.00 - $12.49	36.8	34.9	+ 7.3
$12.50 & over	18.4	17.8	+ 5.3
Price unspecified	4.6	5.1	- 8.2

nc = no change

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel MA-23A(79-1)

NOTE: Production of rainwear by price line was not reported by the Census Bureau for 1978 and 1979.

By Fabric/Construction

Although the men's tailored clothing industry is swinging strongly toward natural fabrics, trade information indicates that all-polyesters will represent about 15 to 25% of many companies' spring 1982 business. Many clothing executives contend that the only way they can keep their suits under the $200 retail range and sport coats below $100 is through the use of all-polyester fabrics. They generally point out that for spring 1982 vested suits in such major fabric classifications as polyester/worsteds and polyester/wool/silk blends will be priced to sell in stores at more than $200. (Daily News Record, June 16, 1981).

(continued)

PRODUCTION

By Fabric/Construction

All-polyesters continue to represent an important fabric in clothing separates although natural fabric concepts are maintaining strength in that category, too.

Among clothing companies that are stressing man-made fabrics, fabrics that incorporate many new salable features are being used, such as the stretch feature, wrinkle-resistance and machine washability—particularly in clothing separates.

The distribution of 1978 and 1979 cuttings of men's tailored clothing, by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Reported Types of Men's Tailored Wear
By Fabric & Construction, 1978, 1979

	1979	1978	% Change in Units 1979/1978
Tailored suits, including uniforms (thous. of units)	15,935	17,526	- 9.1%
Percent:	100.0%	100.0%	
Woven fabric:	84.3	80.4	- 4.7
All cotton & chiefly cotton	1.4	1.4	- 7.6
Man-made/wool blends, chiefly man-made	32.3	31.2	- 5.8
All man-made & chiefly man-made, except man-made/wool blends	37.2	31.7	+ 6.4
All wool & chiefly wool	11.8	12.9	-17.3
All other fabric	1.6	3.2	-52.9
Knit fabric:	6.9	9.1	-28.2
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	6.4	7.2	-16.3
All other fabric	0.5	1.9	-76.9
Fabric, n.s.k.	8.8	10.8	-25.3
Overcoats, topcoats, & tailored suburban & car coats, incl. uniforms (thous. of units)	3,317	4,801	-30.9
Percent:	100.0%	100.0%	
By fabric:			
All man-made & chiefly man-made	37.8	38.3	-31.7
All wool & chiefly wool	36.2	34.3	-27.5
All other fabric	13.6	13.7	-31.6
Fabric, n.s.k.	12.5	13.7	-36.7
By construction:			
Woven fabric	90.2	89.8	-30.6
Knit fabric	1.8	2.3	-45.5
Construction, n.s.k.	8.0	7.8	-30.2

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Men's Tailored Wear
By Fabric & Construction, 1978, 1979
(continued)

	1979	1978	% Change in Units 1979/1978
Suit type dress & sports coats			
(thous. of units)	15,603	14,966	+ 4.3%
Percent:	100.0%	100.0%	
Woven fabric:	79.2	81.1	+ 1.8
All cotton & chiefly cotton	4.9	9.3	-44.8
Man-made/wool blends, chiefly man-made	16.5	18.5	- 6.9
All man-made & chiefly man-made, except man-made/wool blends	35.5	35.0	+ 5.6
All wool & chiefly wool	18.8	13.2	+49.0
All other fabric	3.3	5.0	-31.0
Knit fabric:	11.2	10.6	+ 6.7
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	10.6	10.3	+ 7.6
All other fabric	0.2	0.3	-23.3
Fabric, n.s.k.:	8.8	8.3	+25.7
Separate vests, excl. sweater vests,			
(thous. of units)	5,100	4,536	+12.4
Percent:	100.0%	100.0%	
By fabric:			
All cotton & chiefly cotton	14.2	26.6	-40.2
All man-made & chiefly man-made	66.1	56.1	+32.0
All wool & chiefly wool	3.0	3.1	+ 7.1
All other fabric	0.5	2.4	-78.2
All fabric, n.s.k.	16.3	11.8	+55.1
By construction:			
Woven fabric	88.1	82.7	+19.7
Knit fabric	5.7	8.2	-21.2
Construction, n.s.k.	6.2	9.1	-23.5
Separate dress & sport trousers, incl.			
uniform (thous. of units)	124,688	122,661	+ 1.7
Percent:	100.0%	100.0%	
Woven fabric:	68.6	63.7	+ 9.4
All cotton & chiefly cotton	10.3	11.6	- 9.9
Man-made/wool blends, chiefly man-made	5.3	6.0	-10.5
All man-made & chiefly man-made except man-made/wool blends	45.3	38.1	+20.9
All wool & chiefly wool	4.1	4.0	+ 4.0
All other fabric	3.6	4.0	- 7.8

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Men's Tailored Wear
By Fabric & Construction, 1978, 1979
(continued)

	1979	1978	% Change in Units 1979/1978
Separate dress & sport trousers, incl. uniform (continued)			
Knit fabric:	31.4	36.3	-12.0%
All cotton & chiefly cotton	2.9	2.7	+ 8.1
All man-made & chiefly man-made	22.8	26.0	-10.8
All other fabric	0.1	0.7	-86.5
Fabric, n.s.k.	5.6	6.8	-16.7
Men's & boys' raincoats, incl. uniform	3,672	4,874	-24.7
Percent:	100.0%	100.0%	
By fabric:			
Plastic, rubberized or coated fabric	27.8	44.9	-53.3
Uncoated fabric:			
All cotton & chiefly cotton	1.3	0.8	+28.9
All man-made & chiefly man-made	46.4	35.4	- 1.4
All other fabric	4.7	4.3	+ 1.8

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23-A(79-1).

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed by Kind, 1977
(Millions of Dollars)

	Delivered Costs	% of Total Costs
Men's & boys' suits & coats, total	$846.8	100.0%
Broadwoven fabrics	445.2	52.6
Purchased knitted fabrics	57.1	6.7
All other materials & components, parts, containers & supplies	161.5	19.1
Materials, parts, containers & supplies, n.s.k.	183.0	21.6
Men's & boys' separate trousers, total	658.2	100.0
Broadwoven fabric	316.5	48.1
Purchased knitted fabrics	94.5	14.4
All other components & materials, parts, containers & supplies	111.0	16.9
Materials, parts, containers & supplies, n.s.k.	136.2	20.7
Waterproof outer garments, total	105.2	100.0
Broadwoven fabrics	51.6	49.0
Purchased knitted fabrics	3.3	3.1
All other materials & components, parts, containers & supplies	21.7	20.6
Materials, parts, containers & supplies, n.s.k.	28.6	27.2

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series MC-77-23A, MC-77-23D.

Seasonal Patterns in Production

The table below shows the 1980 distribution of production by months in specified types of tailored wear, as reported in the Census Bureau's monthly survey.

(continued)

PRODUCTION

Seasonal Patterns in Production

Men's Tailored Wear
Percent of Year's Cuttings by Month, 1980

	Suits	Tailored Dress & Sport Coats	Trousers	Overcoats & Topcoats
Total	100.0%	100.0%	100.0%	100.0%
January	8.8	6.4	7.9	6.5
February	8.3	7.0	8.1	7.0
March	8.2	7.9	9.1	8.5
April	9.1	9.7	8.9	7.9
May	8.7	9.1	8.4	10.4
June	7.7	9.7	8.2	10.1
July	5.6	6.8	5.2	6.4
August	8.3	7.9	9.3	9.0
September	8.7	9.8	9.3	9.0
October	10.1	10.1	10.2	9.6
November	8.5	8.4	8.7	8.8
December	7.9	7.2	6.7	6.8

nr = not reported

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Men's Apparel, Series M23B(80)-12.

SHIPMENTS

A preliminary estimate for the year 1980 on the value of shipments of suits and coats (including both men's and boys') by all producers, issued by the Bureau of Industrial Economics, U.S. Census Bureau (U.S. Industrial Outlook 1981), indicated a gain of less than 1% compared with the value of shipments in 1979. A decline of 11.5% was indicated in the value of shipments of separate trousers (men's and boys') in 1980 compared with 1979.

Industry estimates based on a sample survey covering shipments in 1979, issued by the Census Bureau in the Current Industrial Reports (which are not directly comparable to the broader-based 1977 census of manufactures, which includes smaller firms not covered in the CIR or to the annual survey of manufactures data) are reported below.

(continued)

SHIPMENTS

Value of Shipments of Reported Men's Tailored Wear Categories, 1979

	1979 (Mil. $)	% Change 1979/1978
Total, all reported tailored wear	$3,354.7	+ 3.3%
Tailored suits, including uniforms	1,151.6	- 4.1
Overcoats, topcoats & tailored suburban & car coats, including uniforms	138.4	-22.5
Men's & boys' raincoats, including uniforms	106.9	+ 5.1
Tailored suit-type dress & sport coats, including uniforms	673.5	+12.9
Separate dress & sport trousers, including uniform	1,226.5	+10.4
Separate vests, excluding sweater vests	57.8	+18.7
Raincoats (men's & boys')	106.9	- 5.1

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel MA-23A(79-1).

The most comprehensive figures on shipments (including both primary producers and manufacturers classified in other industries who are secondary producers) are covered in the complete census of manufactures, compiled by the Census Bureau at five-year intervals, in years ending in "2" and "7." In interim years, the Census Bureau issues reports in an annual survey of manufactures which is based on a sample of manufacturing firms. The data obtained from the sample are adjusted by the Census Bureau for comparability with the complete census, and available findings for 1978 and 1977 are covered in the following table, as well as value of shipments in 1972.

(continued)

SHIPMENTS

Tailored Wear & Rainwear Shipments by All Producers 1972, 1977, 1978

	Quantity (thous.)		Value (Mil.$)			% Change
	1977	1972	1978	1977	1972	1978/1977
Men's tailored wear, total	201,972	279,659	$3,528.0	$3,384.5	$3,010.1	+ 4.2%
Men's suits, incl. leisure & uniform	19,362	18,877	1,287.9	1,273.4	898.5	+ 1.1
Men's overcoats & topcoats, tailored car & suburban coats, including uniform	5,197	3,352	184.3	179.8	97.0	+ 2.5
Men's tailored dress & sport coats & jackets, incl. uniform	19,514	21,237	628.5	623.0	626.5	+ 0.9
Men's & boys' separate dress & sport trousers (excl. jean-cut casual slacks)	157,899	236,013	1,427.3	1,308.3	1,388.1	+ 9.1
Rainwear, waterproof outer garments (men's & women's)	12,732	15,216	355.0	338.9	321.6	+ 4.7
Commission work on men's & boys' suits & coats	--	--	405.0	371.5	--	+ 9.0
Contract work on separate trousers	--	--	295.9	264.5	--	+11.9
Commission work on waterproof outer garments	--	--	26.6	25.8	--	+ 3.1

Source: U.S. Bureau of the Census, Census of Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978.

By Leading States

Men's suits, sport coats and jackets output is centered in Pennsylvania, while Massachusetts accounted for the largest percentage of men's overcoats and topcoats shipped in 1977.

Pennsylvania accounted for almost 22% of men's suit shipments on a dollar basis, and 29% of the dress and sport coat and jacket shipments.

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)

	1977	1972	% of Total* 1977
Men's Suits			
U.S. Total	$1,273.4	$898.5	100.0%
New England			
Massachusetts	100.1	na	7.8
Middle Atlantic			
New York	248.1	235.6	19.4
New Jersey	36.8	22.0	2.9
Pennsylvania	276.6	168.7	21.7

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Men's Suits (continued)			
Central			
Ohio	75.5	na	5.9%
Kentucky	52.9	na	4.2
Tennessee	57.8	na	4.5
South Atlantic			
Maryland	81.3	108.5	6.4
Georgia	99.4	51.1	7.8
Pacific			
California	39.4	na	3.1
Men's overcoats & topcoats			
U.S. Total	179.8	97.0	100.0
New England			
Massachusetts	37.6	na	20.9
Middle Atlantic			
New York	19.0	16.7	10.6
New Jersey	20.4	na	11.3
Pennsylvania	16.7	na	9.3
North Central			
Minnesota	14.8	na	8.2
South Atlantic			
Georgia	8.7	na	4.8
Dress & sport coats & jackets			
U.S. Total	623.0	626.5	100.0
New England			
Massachusetts	63.3	na	10.2
Middle Atlantic			
New York	70.5	134.0	11.3
New Jersey	31.0	40.4	5.0
Pennsylvania	180.2	135.4	28.9
North Central			
Ohio	27.3	30.0	4.8
Illinois	26.3	29.6	4.2
South Atlantic			
Maryland	20.1	44.7	3.2
Virginia	9.6	na	1.5
Georgia	27.8	39.0	4.5
South Central			
Kentucky	22.4	19.6	3.6
Tennessee	14.1	na	2.3

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Dress & sport coats & jackets (cont'd.)			
Pacific			
California	48.6	45.5	7.8%
Commission work on men's & boys' suits & coats			
U.S. Total	$ 371.5	$445.5	100.0
New England			
Massachusetts	21.3	27.9	5.7
Middle Atlantic			
New York	54.2	71.3	14.6
New Jersey	17.9	28.7	4.8
Pennsylvania	69.3	115.0	18.7
Central			
Missouri	5.8	na	1.6
Tennessee	19.3	10.4	5.1
Alabama	12.4	na	3.3
Mississippi	15.1	na	4.1
South Atlantic			
Maryland	16.4	24.6	4.4
Georgia	45.5	na	12.2
Pacific			
California	3.1	na	0.8
Men's & Boys' separate dress & sport trousers			
U.S. Total	1,308.3	1,388.1	100.0
New England			
Massachusetts	22.0	na	1.6
Middle Atlantic			
New York	167.6	180.8	12.8
New Jersey	10.8	na	0.8
Pennsylvania	63.0	na	4.8
North Central			
Ohio	21.6	40.2	1.7
Missouri	16.6	na	1.3
South Atlantic			
Maryland	28.2	40.8	2.2
Virginia	36.4	19.0	2.8
Georgia	50.8	122.4	3.9

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Men's & Boys' separate dress & sport trousers (continued)			
South Central			
Kentucky	$ 13.9	$ 18.7	1.1%
Tennessee	98.3	155.0	7.5
Alabama	38.1	18.4	2.9
Mississippi	78.7	145.7	6.0
Louisiana	29.5	na	2.3
Texas	246.7	273.0	18.8
Pacific			
California	42.9	42.2	3.3
Contract work on men's & boys' separate trousers			
U.S. Total	264.5	355.0	100.0
Middle Atlantic			
New York	8.9	7.4	3.4
Pennsylvania	38.9	33.7	14.7
North Central			
Missouri	15.9	na	6.0
South Atlantic			
Virginia	9.6	12.9	3.6
Georgia	51.0	59.5	19.3
South Central			
Kentucky	12.1	11.4	4.6
Tennessee	17.8	17.0	6.7
Alabama	38.7	18.9	14.6
Mississippi	21.8	39.4	8.2
Arkansas	8.0	na	3.0
Louisiana	12.3	na	4.7
Texas	8.9	61.2	3.4
Pacific			
California	3.2	1.9	1.2

na = not available
*Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC-1-23A.

PRODUCER PRICE TRENDS

The largest jump in the price indexes covering men's tailored wear was reported for the dress trousers. Prices rose 7.7% over the period February to July 1980 (latest months available). Increases, for the entire year of 3.8% and 3.4% were registered in regular weight suits and tailored sports jackets, respectively, while light weight suits showed no change.

Producer Price Indexes of Selected Types of Men's & Boys' Tailored Wear, 1978—1980

	1980(p)	1979	1978	% Change 1980/1979	% Change 1980/1978
Apparel 1967 = 100	172.2	160.4	152.4	+ 7.4%	+13.0%
Men's Wear 1967 = 100	200.2	186.0	176.1	+ 7.6	+13.7
Suits, reg. wt. 12/77=100	114.6	110.4	105.4	+ 3.8	+ 8.7
Suits, lght. wt. 12/77=100	113.3	113.3	107.4	nc	+ 5.5
Dress trousers 12/77=100	118.0*	109.6	104.0	+ 7.7	+13.5
Tailored sport jackets, 12/77=100	117.9	114.0	108.0	+ 3.4	+ 9.2

*February—July 1980 average
nc = no change
(p) = preliminary

Source: U.S. Department of Labor, Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Bureau of Industrial Economics, imports represented 12.4% of U.S. consumption of men's and boys' suits and coats in 1980, and 31.4% of separate trouser consumption.

The U.S. imported $807.2 million worth of men's and boys' tailored clothing and rainwear in 1980 as opposed to $764.4 million in 1979, a gain of 5.6%. Both figures are C.I.F. values (see footnotes on the following table), as recorded by the Census Bureau. On a quantity measurement, imports of tailored clothing and rainwear were almost 9,200 thousand dozen. This represents an increase of 10.4% over the 8,328 thousand dozen imported into the U.S. in 1979.

U.S. imports of coats, except suit-type, rose 30.0% in value ($204.5 million) in 1980 versus 1979. Cotton coats, except suit-type, accounted for most of this increase with a 44.7% gain in import value of $61.2 million versus the 1979 value of $42.8 million.

Imported trousers of all types rose overall 20.4% in value, spurred by a 25.9% rise in the value of imported cotton trousers.

Several categories of imported men's and boys' tailored clothing and rainwear declined in quantity and value in 1980 as compared to 1979. Suit-type sport coats and jackets fell 14.9% in value, the largest decline of any category. Men's and boys' rainwear and suits both experienced declines in value in 1980 of slightly over 11%.

(continued)

FOREIGN TRADE

Imports

The Far East remains the major exporter of men's and boys' tailored clothing to the U.S., Hong Kong, Korea, Taiwan and Mainland China are the top four countries of origin. These four countries, with $431.4 thousand worth of exports to the U.S., represented over 53% of U.S. imports.

Although imports' share of the men's tailored wear market is small compared with shares in other major apparel markets, domestic producers consider themselves vulnerable to import penetration from low-cost foreign suppliers, owing to the high labor content in their products. Between 2½ and 3 hours of direct labor is required to produce a tailored suit. As a result, industry observers estimate as much as a $15 difference in labor costs between U.S. made suits and those made in low-wage, developing countries. Some of the large U.S. clothing manufacturers have installed labor-saving machines which partially automate certain cutting, sewing and pressing operations to combat this problem. While such equipment improves those manufacturers' competitive position compared with other U.S. or developed country producers, the labor cost advantage of the developing countries is still projected to remain large.

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1979, 1980

	Quantity (Thous. of Doz.)		% Change	Value (S.I.F.)* (Millions of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, reported categories	9,198.0	8,328.4	+ 10.4%	807.2	764.4	+ 5.6%
Suits, total	190.6	252.8	- 24.6	106.7	120.0	- 11.1
Wool	111.9	128.1	- 12.6	81.3	85.9	- 5.4
Man-made	78.7	124.7	- 36.9	25.4	34.1	- 25.5
Suit-type sport coats & jackets, total	255.7	398.7	- 35.9	79.2	93.1	- 14.9
Wool	52.9	70.7	- 25.2	27.0	31.9	- 15.4
Cotton	184.9	203.6	- 9.2	33.6	37.3	- 9.9
Man-made	95.9	124.4	- 22.9	18.6	23.9	- 22.2
Trousers**, total	6,613.6	6,037.1	+ 9.5	407.3	383.3	+ 6.3
Wool	160.8	170.5	- 5.8	31.1	30.9	+ 0.6
Cotton	4,821.0	4,484.2	+ 7.5	303.5	241.1	+ 25.9
Man-made	1,632.0	1,382.4	+ 18.1	72.7	66.3	+ 9.7
Coats, excl. suit-type, total	2,110.7	1,607.1	+ 31.3	204.5	152.3	+ 34.3
Wool	21.6	32.5	- 33.5	10.3	15.9	- 35.2
Cotton	711.0	491.5	+ 44.7	61.2	42.8	+ 43.0
Man-made	1,378.1	1,083.1	+ 27.2	133.0	98.6	+ 34.9
Raincoats	27.4	32.7	- 16.2	9.5	10.7	- 11.2

(footnotes continued)

Imports

*The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

**This category also includes slacks and shorts made from these fibers.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT135, December 1979, 1980.

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Suits, wool, total	111.9	128.1	- 12.6%	81.3	85.9	- 5.4%
France	29.0	32.2	- 9.9	22.7	23.4	- 3.0
Korea	28.3	24.9	+ 13.7	16.1	14.0	+ 15.0
Poland	13.9	14.3	- 2.8	5.4	5.4	nc
Italy	9.1	11.2	- 18.8	13.8	13.5	+ 2.2
Suits, man-made, total	78.7	124.7	- 36.9	25.4	34.1	- 25.5
Korea	46.0	33.7	+ 36.5	17.5	13.5	+ 29.6
Taiwan	17.3	50.3	- 65.6	2.7	8.6	- 68.6
Romania	6.2	11.7	- 47.0	1.4	2.3	- 39.1
Philippines	2.8	13.3	- 78.9	0.8	3.7	- 78.3
Suit-type sport coats & jackets, wool, total	52.9	70.7	- 25.2	27.0	31.9	- 15.4
Korea	12.0	12.6	- 4.7	4.8	4.6	+ 4.3
France	10.1	15.4	- 34.4	5.7	7.9	- 27.8
Poland	5.9	5.1	+ 15.7	1.3	1.1	+ 18.2
Italy	5.4	6.9	- 21.7	6.0	6.1	- 1.6
Suit-type sport coats & jackets, cotton, total	184.9	203.6	- 9.2	33.6	37.3	- 9.9
Poland	38.1	45.2	- 15.7	6.9	8.0	- 13.8
Taiwan	23.9	9.3	+157.0	4.7	1.7	+176.5
Mainland China	23.7	5.1	+364.7	2.7	0.4	+575.0
Hong Kong	23.1	32.6	- 29.1	3.8	5.5	- 30.9

(continued)

Imports

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Suit-type sport coats & jackets, man-made, total	95.9	124.4	- 22.9%	18.6	23.9	- 22.2%
Korea	29.3	52.0	- 43.7	6.2	11.9	- 47.9
Columbia	24.2	21.7	+ 11.5	4.4	3.7	+ 18.9
Mexico	17.4	16.0	+ 8.8	3.9	3.5	+ 11.4
Dominican Republic	7.2	nr	na	0.5	nr	na
Trousers, wool, total#	160.6	170.5	- 5.8	31.1	30.9	+ 0.6
Korea	56.7	74.6	- 24.0	8.1	10.0	- 19.0
Italy	27.0	28.2	- 4.2	9.8	8.5	+ 15.3
Hong Kong	18.7	14.6	+ 28.1	3.5	2.7	+ 29.6
Mainland China	16.5	nr	na	1.6	nr	na
Trousers, cotton, total#	4,821.0	4,484.2	+ 7.5	303.5	241.1	+ 25.9
Hong Kong	2,240.8	1,983.4	+ 13.0	163.3	124.9	+ 30.7
Mainland China	696.0	875.2	- 20.5	24.2	24.4	- 0.8
Singapore	372.6	331.3	+ 12.5	22.0	18.0	+ 22.2
Taiwan	302.1	317.2	- 4.7	19.1	16.9	+ 13.0
Trousers, man-made, total#	1,632.0	1,382.4	+ 18.1	72.7	66.3	+ 9.7
Taiwan	809.7	574.5	+ 40.9	32.8	25.6	+ 28.1
Mexico	462.1	388.3	+ 19.0	19.1	14.8	+ 29.1
Korea	104.3	198.9	- 47.6	7.3	14.1	- 48.2
Hong Kong	57.3	67.2	- 14.7	4.0	4.4	- 9.1
Coats, excl. suit-type, wool, total	21.6	32.5	- 33.5	10.3	15.9	- 35.2
Yugoslavia	5.6	3.9	+ 43.6	1.6	2.3	- 30.4
United Kingdom	2.5	4.1	- 39.0	1.9	3.7	- 48.6
Hong Kong	2.4	4.4	- 45.5	0.8	1.2	- 33.3
Italy	2.0	3.3	- 39.3	2.2	2.9	- 24.1
Coats, excl. suit-type, cotton, total	711.0	491.5	+ 44.7	61.2	42.8	+ 43.0
Sri Lanka	155.5	48.8	+218.6	9.1	2.2	+313.6
Mainland China	118.4	37.5	+215.7	6.4	2.2	+190.9
Hong Kong	100.1	61.5	+ 62.8	13.1	8.7	+ 50.6
Macao	91.6	74.9	+ 22.3	7.0	5.5	+ 27.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Coats, excl. suit-type, man-made, total	1,378.1	1,083.1	+ 27.2%	133.0	98.6	+ 34.9%
Korea	602.6	372.0	+ 62.0	64.0	42.8	+ 49.5
Taiwan	268.0	147.1	+ 82.2	27.1	15.2	+ 78.3
Hong Kong	123.6	130.6	- 5.4	15.2	14.9	+ 2.0
Mexico	109.5	72.9	+ 50.2	9.8	6.9	+ 42.0
Raincoats, total	27.4	32.7	- 16.2	9.5	10.7	- 11.2
Poland	8.1	7.0	+ 15.7	2.8	2.4	+ 16.6
Hong Kong	7.1	3.7	+ 91.9	1.5	0.9	+ 66.7
Yugoslavia	1.8	2.2	- 18.2	0.2	0.9	- 77.8
Thailand	1.7	3.0	- 43.3	0.4	0.7	- 42.9

*The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

#This category also includes slacks and shorts made from these fibers.

nr = not reported
na = not available

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135, December 1979, 1980.

Exports

In 1980, the U.S. exported over 3.6 million dozen of men's and boys' tailored apparel and rainwear valued at over $97 million. This was an astounding 115.0% increase over the previous years 1.7 million dozen, valued at $82.7 million! Clothing of man-made material accounted for most of this increase with a 425.1% gain in unit volume, to 2.2 million dozen versus 416 thousand dozen in 1979. This category, which accounted for 24.8% of exports in 1979 grew to 60.5% in 1980.

By far the largest category exported in 1980 in the tailored clothing sector was trousers and slacks. This group accounted for 68.7% of the unit volume of tailored clothing exports, while representing 60.3% of exports in terms of value.

(continued)

FOREIGN TRADE

Exports

The largest gain in terms of volume in 1980 was registered by the knit wool suits, coats, raincoats, jackets, trousers and shirts group, which climbed 274% to 28.8 thousand dozen. A close second was coats and jackets, except suit-type, including rainwear, which captured a 263.3% gain. No overall category registered a decline in either units or value during 1980.

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1979, 1980

	Quantity (Thous. of Doz.)		% Change	Value (F.A.S.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, all reported categories	3,608.3	1,678.2	+115.0%	$97,011	$82,749	+ 17.2%
Wool	66.6	40.6	+ 64.0	5,349	3,761	+ 42.2
Cotton	1,357.3	1,221.6	+ 11.1	47,378	52,785	- 10.2
Man-made	2,184.4	416.0	+425.1	44,284	26,203	+ 69.0
Suits, total	42.8	28.1	+ 52.3	3,561	2,404	+ 48.1
Knit:						
Cotton	12.4	10.4	+ 19.2	866	594	+ 45.8
Man-made	4.0	3.1	+ 29.0	480	522	- 8.0
Not knit:						
Wool	1.2	0.5	+140.0	170	119	+ 42.9
Cotton	13.7	10.9	+ 24.7	772	582	+ 32.6
Man-made	11.5	3.2	+259.4	1,273	587	+116.9
Suit-type sport coats & jackets, total	177.3	112.5	+ 57.6	11,726	9,952	+ 17.8
Knit:						
Cotton	48.0	33.7	+ 42.4	2,130	1,766	+ 20.6
Man-made	38.1	12.3	+209.8	1,491	1,792	- 16.8
Not knit:						
Wool	4.6	12.9	- 64.3	984	1,088	- 9.6
Cotton	13.7	19.3	- 29.0	1,512	2,052	- 26.3
Man-made	72.9	34.3	+112.5	5,609	3,254	+ 72.4
Trousers & slacks, total	2,477.6	1,287.4	+ 92.4	58,546	54,240	+ 7.9
Knit:						
Cotton	143.8	93.8	+ 53.3	6,247	4,577	+ 36.5
Man-made	358.2	57.8	+519.7	3,667	2,918	+ 25.7
Not knit:						
Wool	21.8	16.5	+ 32.1	599	750	- 20.1
Cotton	965.7	924.2	+ 4.5	29,015	36,988	- 21.6
Man-made	988.1	195.1	+406.5	19,018	9,007	+111.1

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (F.A.S.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Coats & jackets, excl. suit-type, incl. rainwear, total	881.8	242.5	+263.6%	$20,850	$14,881	+ 40.1%
Knit:						
Cotton	116.9	105.8	+ 10.5	3,196	3,913	- 18.3
Man-made	368.9	38.7	+853.2	5,599	3,202	- 74.9
Not knit:						
Wool	10.2	3.0	+240.0	1,268	532	+138.3
Cotton	43.1	23.5	+ 83.4	3,640	2,313	+ 57.4
Man-made	342.7	71.5	+379.4	7,147	4,921	+ 45.1
Wool suits, coats, raincoats, jackets, trousers & shirts—knit, total	28.8	7.7	+274.0	2,328	1,272	+ 83.0

*The value is generally equivalent to a F.A.S. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census, U.S. Exports-Schedule E Commodity by Country FT410, December 1979, 1980.

AT THE RETAIL LEVEL

THE MARKET FOR MEN'S WEAR

Male Population

Between 1980 and 1985, the Census Bureau projects an increase of 16.8% in the number of males aged 35-49 years in the U.S. By the year 2000, it is expected that this age group will be 64.6% larger than in 1980 and represent 23.3% of the total male population. Older age groups (50-64 years, 65 years and over) are also expected to increase significantly in numbers during these years.

As shown in the table charting male employment, the U.S. is becoming more and more a nation of white collar workers. While the total number of employed males declined by 0.5% between 1978 and 1980, the percentage of men employed in white collar occupations fared better, rising 3.8% between the same years. Those employed in blue collar jobs slipped on a percentage basis, down 5.4% to 43.6% of the males employed.

(continued)

THE MARKET FOR MEN'S WEAR

Male Population

These statistics show more American males entering their prime earning years, and entering occupations where their earnings will be at a peak. This is good news for manufacturers of men's tailored wear because the corresponding increase in personal disposable income for these males could surely spurt sales of these items upwards.

Male Population of the U.S., 1980 & Projections* to 2000
(Thousands of Males)

	1980	1985	2000	% Change 2000/1980	Percent of Male Population 1980	1985	2000
Total, all ages	110,032	113,366	126,558	+ 15.0%	100.0%	100.0%	100.0%
Under 15 years	26,215	26,426	29,191	+ 11.4	23.8	23.3	23.1
15 years & over	83,817	86,940	97,367	+ 16.2	76.2	76.7	76.9
15-19 years	10,752	9,150	10,069	- 6.4	9.8	8.1	8.0
20-34 years	29,039	30,142	25,662	- 11.6	24.4	26.6	20.3
35-49 years	17,954	20,976	29,556	+ 64.6	16.3	18.5	23.3
50-64 years	15,770	15,659	19,364	+ 22.8	14.3	13.8	15.3
65 years & over	10,302	11,013	12,716	+ 23.4	9.4	9.7	10.0
Median age in years	28.8	30.3	34.1				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977)
1980 Census of Population
PC80-S1-11, May 1981.

Employment

Male Employment by Occupational Group, 1978, 1979, 1980
(Males 16 Years of Age & Older)

	1980	1979	1978	% Change 1980/1978*
Total males employed, (in thousands)	54,764	55,318	55,032	- 0.5%
		% of Total		
White collar workers	43.8	42.7	42.0	+ 3.8
Professional & technical	16.1	15.7	15.7	+ 2.0
Managers & administrators	15.1	14.5	14.1	+ 6.6
Sales workers	6.2	6.1	6.0	+ 2.2
Clerical	6.4	6.4	6.2	+ 3.5
Blue collar workers	43.6	44.8	45.9	- 5.4
Craft & kindred workers	20.6	21.0	21.4	- 4.4
Operatives	11.3	11.3	11.8	- 4.4
Nonfarm laborers	6.2	6.7	6.8	- 8.5
Service workers	9.0	8.9	8.3	- 5.4
Farm workers	3.6	3.6	3.6	- 2.0

*Percentage change is based on the actual number of workers in each category.

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

Employment by State

Employment of Males (Age 20 & Over) by Occupation, by State, 1979
(Numbers in Thousands)

	Total Male Population	Male Employment	White Collar Employment	% of total White Collar Employment
U.S. Total	68,404	52,311	21,594	100.0%
Alabama	1,145	853	276	1.3
Alaska	113	86	40	0.2
Arizona	745	536	247	1.1
Arkansas	657	436	146	0.7
California	7,132	5,497	2,622	12.1
Colorado	855	699	333	1.5
Connecticut	990	779	368	1.7
Delaware	18[illegible]	13[illegible]	63	0.2
District of Columbia	262	146	82	0.4
Florida	2,831	1,905	813	3.7
Georgia	1,499	1,170	484	2.2
Hawaii	263	194	82	0.4

(continued)

Employment by State

Employment of Males (Age 20 & Over) by Occupation, by State, 1979
(Numbers in Thousands)
(continued)

	Total Male Population	Male Employment	White Collar Employment	% of total White Collar Employment
Idaho	280	224	84	0.4%
Illinois	3,491	2,727	1,145	5.3
Indiana	1,668	1,314	409	1.9
Iowa	923	742	242	1.1
Kansas	760	612	238	1.1
Kentucky	1,087	821	273	1.3
Louisiana	1,177	893	338	1.6
Maine	344	242	89	0.4
Maryland	1,296	1,050	512	2.4
Massachusetts	1,829	1,418	656	3.0
Michigan	2,859	2,155	784	3.6
Minnesota	1,303	1,042	429	2.0
Mississippi	695	497	173	0.8
Missouri	1,540	1,167	487	2.3
Montana	247	192	66	0.3
Nebraska	488	388	141	0.7
Nevada	232	189	67	0.3
New Hampshire	284	232	102	0.5
New Jersey	2,301	1,764	829	3.8
New Mexico	364	274	122	0.6
New York	5,465	4,035	1,909	8.8
North Carolina	1,689	1,339	476	2.2
North Dakota	201	157	56	0.3
Ohio	3,351	2,613	990	4.6
Oklahoma	899	672	291	1.3
Oregon	838	636	260	1.2
Pennsylvania	3,742	2,735	1,067	4.9
Rhode Island	300	219	95	0.4
South Carolina	863	660	241	1.1
South Dakota	212	171	56	0.3
Tennessee	1,347	1,013	359	1.7
Texas	4,077	3,291	1,336	6.2
Utah	380	302	133	0.6
Vermont	157	121	47	0.2
Virginia	1,565	1,245	554	2.6
Washington	1,251	966	404	1.9
West Virginia	596	411	115	0.5
Wisconsin	1,485	1,192	422	2.0
Wyoming	144	123	41	0.2

Source: U.S. Bureau of Labor Statistics, Geographic Profile of Employment & Unemployment, 1979 (Report 619), December 1980.

RETAIL SALES

The men's tailored clothing classification encompasses a variety of products, including suits, sport jackets, separate vests, topcoats, etc., which are sold in a variety of retail outlets. This diversity, plus the fact that items, such as "trios" (separate jackets, vests and pants) may be classified as suits rather than separates make it difficult to report accurately an estimate of the value of the men's tailored wear industry by type of product.

Men's suit sales declined by 12% in 1980 according to data published in Chain Store Age (January 1981) while sport jackets fell 10% and men's and boys' slacks were up 3%. Estimates for 1981 from the same source indicate a rise of 3% in sport jacket sales, a 5% rise in men's and boys' slacks and suit sales to continue their decline by registering a 2% fall.

The total retail market for suits and sport coats in 1979 was estimated at $3.7 billion, according to Chain Store Age, General Merchandise Edition (November 1980). This estimate is the result of consumer research conducted by Market Research Corporation of America (MRCA) which monthly monitors 7,500 households for a representative cross-section of nationwide purchases.

Suits and sport coats dominated the reported men's wear business, exceeding spending for casual pants and jeans, the second largest category, by over $1 billion.

Spending For Tailored Wear Compared With Other Types of Men's Wear, 1979

	Mil. Units	Value (Bil. $)
Suits & sport coats	44.6	$ 3.7
Slacks & shorts	127.9	1.7
Casual pants & jeans	216.9	2.6
Outerwear	55.8	1.6
Dress shirts	160.2	1.5
Sport shirts, tops	244.0	1.9
Pj's & robes	39.9	.4
Underwear	589.5	1.1
Socks	622.0	0.7
Sweaters & bathing suits	87.8	1.2

Source: Market Research Corp. of America, Chain Store Age (November 1980).

The MRCA data indicated that 22.5% of total spending for men's wear in 1979 (projected to $16.5 billion) was accounted for by men's suits and sport coats. Slacks and shorts accounted for 10.5%.

The latest official data, reported by the U.S. Census Bureau, on merchandise line sales is from the 1977 census of retail trade. Merchandise line data was reported only by stores with payrolls, and not all store types gave breakdowns in men's wear sales by type. However, reported sales on men's suits, tailored jackets and slacks amounted to $4.3 billion in 1977; overcoats and topcoats, $603.9 million; rainwear and outerwear, $853.1 billion.

(continued)

RETAIL SALES

Sales of these tailored wear and rainwear categories came to a total of over $5.8 billion (out of a total for all men's and boys' wear, not including footwear, amounting to $22.7 billion).

The sales share held in various types of tailored wear and rainwear by the store types reporting on these categories is covered in the following table. Men's wear stores accounted for over half of the volume in men's suits, tailored jackets and slacks. Department stores held the largest share of overcoat sales and of rainwear business.

By Store Type

Retail Sales of Specified Men's Tailored Wear Categories By Type Of Retail Outlets Reporting for 1977
(includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Men's suits, tailored jackets, slacks, total*	38,060	100.0%	$4,344.4	100.0%
Department stores	7,337	19.3	1,413.9	32.5
Men's wear stores	15,499	40.7	2,267.8	52.2
Family clothing stores	10,509	27.6	522.8	12.0
Women's ready-to-wear stores	965	2.5	62.9	1.5
Shoe stores:				
Men's	35	0.1	0.3	#
Family	110	0.3	1.8	#
Non-store retailers:				
Mail order houses	3,605	9.5	74.9	1.7
Men's overcoats, topcoats, total*	21,711	100.0%	$ 603.9	100.0%
Department stores	4,568	21.0	293.1	48.5
Men's wear stores	8,931	41.1	205.1	34.0
Family clothing stores	5,797	26.7	88.5	14.6
Non-store retailers:				
Mail order houses	2,415	11.1	17.3	2.9
Men's rainwear, outerwear, total*	30,112	100.0%	$ 853.1	100.0%
Department stores	6,235	20.7	341.7	40.0
Men's wear stores	12,854	42.7	333.1	39.1
Family clothing stores	7,353	24.4	117.1	13.7
Shoe stores: Men's	106	0.4	0.4	0.1
Non-store retailers:				
Mail order houses	3,564	11.8	60.8	7.1

*Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census,
Census of Retail Trade 1977.

RETAIL SALES

By Store Type

Contribution of Men's Tailored Wear & Rainwear Sales To Total Men's & Boys' Wear in Department Stores, Men's Wear Stores & Family Clothing Stores, 1977
(Includes only stores with payroll)

	Department Stores	Men's & Boys' Wear Stores	Family Clothing Stores
Total Store Sales (millions of $)	$76,909.4	$6,838.8	$7,883.6
Men's & boys' wear (except footwear) sales, total	10,574.9	6,275.4	3,001.5
Percent	100.0%	100.0%	100.0%
Types of men's wear:			
Suits & formal wear	13.4	36.1	17.4
Rainwear & outerwear	3.2	5.3	3.9
Overcoats & topcoats	2.8	3.3	2.9
Other men's & boys' wear	80.6	56.3	75.8

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

By Store Type: Department Stores

The number of firms operating department stores declined to 600 in 1977, according to the Census of Retail Trade, from a total of 866 counted in the 1972 census, representing a drop of 30.7%. The number of stores operated by these firms (which include such operations as Federated, Allied Stores, Associated Dry Goods, etc.) increased 13.7%, from 7,742 department stores counted in 1972 to 8,807 in 1977. Department store sales were up 50.5% in this period, according to the Census Bureau, reaching $77 billion in 1977 compared with $51.1 billion in 1972.

Department store business has become much more concentrated among the big firms. In 1977, firms with annual sales of $100 million or more (numbering 79) operated 83% of the department stores and accounted for close to 92% of department stores' total sales volume.

In 1972, department store firms with sales of $100 million and up (66 firms) operated 73.2% of the department store units and accounted for 73.8% of all department stores in business in 1977 and controlled 86.5% of department store sales. In 1972, the 50 largest firms operated 67.4% of the department stores and controlled 82% of total department store business in that year.

(continued)

RETAIL SALES

By Store Type: Department Stores

Department Stores, 1977/1972 (SIC 531*)

	Firms		Stores**		Sales	
	No.	%	No.	%	Thous.$	%
Year 1977						
All firms	600	100.0%	8,807	100.0%	$76,909,452	100.0%
With annual sales of—						
$100 mil. or more	79	13.2	7,311	83.0	70,605,243	91.8
$ 50 mil.—$99.9 mil.	32	5.3	453	5.1	2,268,387	2.9
Under $50 mil.	489	81.5	1,043	11.8	4,035,822	5.2
Year 1972						
All firms	866	100.0%	7,742	100.0%	$51,083,522	100.0%
With annual sales of—						
$100 mil. or more	66	7.6	5,664	73.2	44,023,994	86.2
$ 50 mil.—$99.9 mil.	31	3.6	564	7.3	2,210,309	4.3
Under $50 mil.	769	88.8	1,514	19.5	4,849,219	9.5

*Includes discount department stores and department store outlets of mail order chains, as well as traditional department stores, under the Standard Industrial Classification system.

**Each business location is counted as a separate store. Each branch store of a multi-unit department store organization is separately counted, as well as individually classified by store type based on merchandise mix and size.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Stores classified as department stores accounted for 8.3% of the stores reporting sales of men's and boys' wear in 1977 and 46.5% of total sales in this category—compared with 40.9% in 1972.

Over 48% of all men's overcoats/topcoats sales were consumated in department stores while 40.0% of rainwear/outerwear and 32.5% of men's suits, tailored jackets and slacks sales were transacted in these same stores during 1977. Department stores were the prime outlets for overcoats/topcoats and rainwear/outerwear sales during that same year, according to the U.S. Bureau of the Census.

Merchandise operating results, compiled by the National Retail Merchants Association, show that among department stores with total sales volume of over $1 million in 1979, the typical store registered declines of 5.1% and 3.0% in sales of suits and formal wear and overcoats, topcoats, rain, storm and dual purpose coats, respectively, versus 1978. Men's clothing, as an entire group, showed a 2.9% gain for the year while the all adult male apparel category showed a 5.6% rise.

By Store Type: Department Stores

Men's Departmental Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million, 1979
Typical (median) Results

	All Adult Male Apparel	Men's Clothing	Overcoats, Topcoats Rain, Storm & Dual Purpose Coats	Suits & Formal Wear
Net sales, % change from last year	+ 5.6%	+ 2.9%	- 3.0%	- 5.1%
Sales, % of merchandise division	100.0	39.1	7.0	9.1
Sales, % of total store sales	9.0	3.8	0.6	0.9
$ sales per square foot of selling space	$130.5	$121.0	na	$133.0
Cumulative markon, %	49.9%	50.2%	49.3%	49.4%
Gross margin, % of sales including cash discounts	42.3	38.3	42.8	29.5
Markdowns, retail, % of sales	12.6	17.6	12.3	24.3
Returns, % of sales	7.8	9.5	na	9.4
Number of stock turns	2.7	2.2	3.2	1.7
Salespeople's salaries, % of sales	7.1	7.4	7.2	7.8
Sales promotions, % of sales	2.9	3.4	3.2	4.5

na = not available

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1979 Edition.

By Store Type: Men's Wear Stores

There has been increasing concentration of men's and boys' wear store business among large firms in recent years, according to the U.S. Bureau of the Census, and this trend is continuing.

The total number of firms operating men's and boys' wear stores dropped from 18,310 when the complete census of retail trade was conducted covering 1972 to 16,908 counted in the 1977 census (a decline of 7.6%). The number of men's and boys' wear stores operated by these firms dropped 2.0% in this same period—from 23,158 in 1972 to 22,683. In the same period, the share of total men's and boys' wear sales done by these stores dropped from 32.8% in 1972 to 27.6% in 1977.

Men's and boys' wear retailer firms with sales of $1 million or more increased from 608 in 1972 to 934 in 1977, for a gain of 53.6%. These large firms represented 5.5% of the total men's and boys' wear retailer firms in 1977 compared with 3.4% in 1972. The million dollar-and-over firms operated 5,595 men's and boys' wear stores in 1977 (24.7% of the total). In 1972 they operated 3,918 stores (16.9% of the total).

The 934 firms with sales of $1 million or more (5.5% of all firms) accounted for close to 50% of all men's and boys' wear specialty store volume in 1977. This compares with their 42% share in 1972.

RETAIL SALES

By Store Type: Men's Wear Stores

Men's & Boys' Wear Stores, 1977/1972 (SIC 561*)

	1977					
	Firms		Stores		Sales	
	No.	%	No.	%	Mil. $	%
All firms	16,908	100.0%	22,683	100.0%	$6,943.2	100.0%
With annual sales—						
$1 mil. or more	934	5.5	5,595	24.7	3,395.1	48.9
$100 mil. or more	3	**	557	2.5	(300.0)	4.3
10 mil.-$99.9 mil.	36	0.2	1,986	8.8	1,080.9	15.6
5 mil.-$9.9 mil.	66	0.4	684	3.0	444.3	6.4
1 mil.-$4.9 mil.	829	4.9	2,368	10.4	1,569.9	22.6
$500,000 to $0.9 mil.	1,484	8.8	2,172	9.6	1,031.8	14.9
Less than $500,000	14,490	8.6	14,916	65.7	(2,516.3)	36.2

	1972					
	Firms		Stores		Sales	
	No.	%	No.	%	Mil. $	%
All firms	18,310	100.0%	23,158	100.0%	$5,584.3	100.0%
With annual sales—						
$1 mil. or more	608	3.4	3,918	16.9	2,323.8	41.6
$100 mil. or more	2	**	498	2.1	(200.0)	3.6
10 mil.-$99.9 mil.	23	0.1	1,261	5.4	(927.1)	16.6
5 mil.-$9.9 mil.	23	0.1	235	1.0	165.0	2.9
1 mil.-$4.9 mil.	560	3.1	1,924	8.3	1,031.7	18.5
$500,000 to $0.9 mil.	1,180	6.4	1,854	8.0	831.4	14.9
Less than $500,000	16,522	90.2	17,386	75.1	2,429.1	43.5

*Establishments primarily engaged in the retail sales of men's and boys' ready-to wear clothing and furnishings.
**Less than 0.1%

Note: Figures in parenthesis represent estimates, as the Census Bureau withheld sales figures for these groups to avoid disclosure of individual operations. Volume of the three firms with sales of $100 million or more in 1977 has been conservatively estimated at $300 million, but is probably higher. This would mean that the 934 firms who have sales of $1 million or more probably control more than 48.9% of sales.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Men's & boys' wear stores accounted for about 28% of total reported sales of men's and boys' wear in all retail outlets with payroll in 1977 compared with 32.8% in 1972. As previously noted, among store types reporting separately on tailored wear sales in the 1977 Census, men's wear stores accounted for 52.2% of suit, tailored jacket and slack sales, 34% of sales of men's overcoats and topcoats. In men's rainwear, 39.1% of reported sales were in men's wear stores.

RETAIL SALES

By Store Type: Men's Wear Stores

According to the Menswear Retailers of America, men's clothing sales in men's wear specialty stores decreased by 3.1% in 1980 over 1979. This decrease was led by men's suits which recorded a sales loss of 8.7% followed by the 2.3% loss in men's coats. Men's sport coats and dress slacks bucked the trend toward lower sales by registering 7.6% and 2.7% increases, respectively.

Percent of Men's Wear Store Sales Accounted For
By Men's Tailored Clothing, 1979, 1980
(Median Results)

	All Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
	1980 (83 firms)	1979 (102 firms)	1980 (42 firms)	1979 (61 firms)	1980 (41 firms)	1979 (41 firms)
Total store sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's tailored wear	44.3	43.0	46.3	48.5	32.5	32.5
Men's suits	21.0	22.3	22.6	26.1	16.4	17.2
Sport coats	9.8	9.0	11.1	9.1	9.4	8.0
Dress slacks	8.6	8.1	9.1	8.7	7.4	6.5
Men's coats	2.7	2.8	3.3	3.1	2.3	2.3
Total men's clothing department sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's suits	47.8	52.2	48.3	54.4	47.4	50.5
Sport coats	25.1	22.4	23.9	20.1	28.3	25.6
Dress slacks	20.0	18.1	22.5	17.4	19.0	18.3
Men's coats	6.6	6.4	6.6	6.4	6.7	6.6

Source: Menswear Retailers of America, Annual Business Survey, June 1980, June 1981.

Family Clothing Stores

The 826 firms operating family clothing stores—which sell apparel for men, boys, women and children—in the U.S. in 1977, which had sales of $1 million or more, represented 5.2% of all firms in this classification. These large firms operated a total of 5,717 family clothing stores which accounted for 72.8% of total family clothing store business in 1977.

Comparable figures for 1972 are not available. However, family clothing store firms with a volume of $500,000 or more in 1977 operated a third of all family clothing stores and accounted for 81.2% of total family clothing store business. In 1972 firms of this size operated 26% of the stores which did 72.3% of total family clothing store business that year.

(continued)

Family Clothing Stores

Family Clothing Stores, 1977/1972 (SIC 565*)

	Firms		Stores		Sales	
	No.	%	No.	%	Mil. $	%
Year 1977						
All firms	15,873	100.0%	21,556	100.0%	$8,054.7	100.0%
With annual sales—						
$1 million or more	826	5.2	5,717	26.5	5,867.6	72.9
$100 mil. or more	8	**	1,959	9.1	2,358.0	29.3
$ 10 mil.-$99.9 mil.	143	0.9	1,956	9.1	2,191.9	27.2
$ 5 mil.-$9.9 mil.						
$ 1 mil.-$4.9 mil.	675	4.2	1,802	8.4	1,317.7	16.4
$500,000-$0.9 mil.	963	6.1	1,360	6.3	673.7	8.4
Less than $500,000	14,084	88.7	14,479	67.2	1,513.4	18.7
Year 1972						
All firms	14,032	100.0%	18,224	100.0%	$4,926.8	100.0%
With annual sales—						
$100 mil. or more	3	**	982	5.4	(D)	--
$ 10 mil.-$99.9 mil.	37	0.3	1,046	5.7	(D)	--
$ 5 mil.-$9.9 mil.	42	0.3	400	2.2	294.3	6.0
$ 1 mil.-$4.9 mil.	428	3.0	1,260	6.9	884.8	18.0
$500,000-$0.9 mil.	696	5.0	1,055	5.8	(D)	--
Less than $500,000	12,826	91.4	13,481	74.0	1,366.3	27.7

*Establishments primarily engaged in the retail sale of clothing, furnishings, and accessories for men, women and children without specializing in any one line.
**Less than 0.1%
(D) = Figures withheld by the U.S. Census Bureau to avoid disclosure of individual operations.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Family clothing stores accounted for 13.2% of total reported sales of all men's and boys' wear in all retail outlets with payroll in 1977, up from 11.8% in 1972.

As previously noted, family clothing stores accounted for almost 15% of sales of men's overcoats and topcoats among reporting stores, 12% of suit, tailored jacket and slacks sales, almost 14% of rainwear and outerwear sales.

RETAIL SALES

Seasonal Patterns

Percent of Year's Total Men's Clothing Sales by Month
(Five Year Average*)

Total	100.0%
January	6.7
February	5.0
March	6.5
April	7.7
May	8.8
June	9.1
July	6.5
August	5.8
September	7.4
October	9.6
November	11.0
December	15.7

*Five year average, 1961-1965 (latest available).

Source: Newspaper Advertising Bureau based on Federal Reserve Board sales reports.

RETAIL ADVERTISING

As expected, reports of newspaper advertising linage for 1980 show overcoats to be advertised most heavily during the last quarter of the year, with November having the largest share of ad linage. The biggest month for advertising men's slacks is June, while the heaviest newspaper promotions on sport coats were in November. Men's suit advertising was heaviest in March, with April not far behind.

Percent of Year's Total Newspaper Advertising Linage on Men's Clothing By Months, 1980

	Outercoats	Slacks	Sport Coats	Suits
Total	100.0%	100.0%	100.0%	100.0%
January	9.2	4.0	6.7	6.4
February	9.3	5.8	7.0	6.7
March	7.0	7.9	7.7	10.8
April	4.4	8.0	9.7	10.5
May	1.2	8.8	7.6	9.5
June	0.6	12.6	8.1	8.5
July	1.4	5.0	4.2	5.1
August	2.0	10.7	6.4	6.9
September	10.4	8.1	10.0	9.1
October	18.8	7.8	10.7	9.6
November	20.5	9.4	11.9	9.2
December	15.2	11.9	10.0	7.4

Source: Advertising Checking Bureau; Newspaper Advertising Bureau, Inc.

CONSUMER PRICE INDEX

The consumer price index for all men's wear averaged 106.0 in 1980 (12/77=100), which represented a 4.4% increase over the 1979 average. Suits, sport coats and jackets advanced 2.2% in 1980 after this category had actually registered a decrease in price of 0.5% in the previous year. The men's coats and jackets group also decreased in price between 1978 and 1979, a 2.1% decline, but did show an increase in 1980, according to the index. This increase of 1.9% still left consumer prices below that of the the 1978 level.

Consumer Price Indexes on Selected Men's Wear
Annual Average 1980, 1979, 1978
(12/77=100)

	1980(p)	1979	1978	% Change 1980/1979	% Change 1980/1978
Men's Wear	106.0	101.5	99.9	+ 4.4%	+ 6.1%
Suits, sportcoats jackets	100.9	98.7	99.2	+ 2.2	+ 1.7
Coats & jackets	97.4	95.6	97.7	+ 1.9	- 0.3

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In March 1980, the Celanese Fibers Marketing Company conducted a survey of 1,000 men 18 years of age and older to determine measurable segments in the men's wear market. The criteria for respondents was that they must have purchased at least three items from each of twelve different men's apparel categories within the last twelve months.

The survey results identified four major segments in the men's market based on consumer characteristics: the contemporary man (28% of the men's market), the establishment man (32% of the market), the inactive man (21% of the market) and the formative man (19% of the market). The table on the next page shows some demographic characteristics of each group.

(continued)

Demographic Profile of the Four Major Men's Segments

	Types of Men			
	Contemporary	Establishment	Inactive	Formative
Income:	100%	100%	100%	100%
Under $20,000	13	19	28	34
$20,000 - $25,000	20	19	21	23
$25,000 - $35,000	34	31	25	19
Over $35,000	24	22	13	13
Age:	100%	100%	100%	100%
Under 35	41	45	32	72
Over 35	59	55	68	28
Occupation:	100%	100%	100%	100%
Employed full time	91	90	78	80
White collar	72	66	49	28
Blue collar	18	23	29	51
Student	2	4	2	11
Retired	3	3	12	--
Education:	100%	100%	100%	100%
No college	29	21	45	59
Some college	31	39	26	31
College graduates	40	40	29	10
Marital Status:	100%	100%	100%	100%
Married	65	70	83	44
Single	22	22	12	44
Other (divorced, widowed, etc.)	13	8	5	12

Apart from classifying four segments of the men's wear market, the Celanese study also explored the buying habits of the various groups. The contemporary man, without exception spends more money per item of tailored clothing than other groups do, according to the average price paid.

The main difference between the contemporary man and the establishment man is the latter's conservative taste in apparel. Oldest of the four groups is the inactive man. Fully 12% of its members are retired. The formative man, comprised mostly of students and blue collar workers, have the least available income to spend on men's wear.

Tailored Wear Buying Habits of Four Types of Men

	Slacks	Suits	Sport coats/ Blazers	Topcoats
Contemporary man (28% of market)				
% who purchased item in the last 12 months	80.0%	59.0%	37.0%	31.0%
Average no. purchased	3.2	3.5	1.5	1.1
Average purchase price	$29	$184	$115	$134
% purchased at sale prices	21.0%	26.0%	31.0%	31.0%
Establishment man (32% of market)				
% who purchased item in the last 12 months	87.0%	58.0%	36.0%	31.0%
Average no. purchased	3.0	3.1	1.3	1.0
Average purchase price	$21	$168	$99	$112
% purchased at sale prices	24.0%	36.0%	39.0%	45.0%
Inactive man (21% of market)				
% who purchased item in last 12 months	78.0%	42.0%	30.0%	20.0%
Average no. purchased	3.5	2.8	1.3	1.0
Average purchase price	$21	$134	$78	$85
% purchased at sale prices	42.0%	45.0%	53.0%	43.0%
Formative man (19% of market)				
% who purchased item in last 12 months	71.0%	36.0%	16.0%	16.0%
Average no. purchased	3.3	2.6	1.3	1.0
Average purchase price	$22	$128	$73	$93
% purchased at sale prices	42.0%	33.0%	29.0%	33.0%

An R.H. Bruskin survey asked 1,250 men, selected to mirror the national population, to indicate the most important factor in their decision when selecting their apparel. The results were published in Daily News Record (October 28, 1980) and indicated that 36% of all respondents ranked "fit/comfort" as their most important factor when purchasing men's wear. Price ranked next, followed (in descending order) by quality, color/style, brand name and lastly the store itself. This survey, when compared to a similar study in 1977, shows little significant change in attitude.

CONSUMER BUYING HABITS

"What is the most important factor in your decision whether to buy men's apparel"

	Fit/ Comfort	Price	Quality	Color/ Style	Brand/ Store Name
Total, all respondents	36%	24%	16%	12%	12%
Income:					
Under $10,000	29	38	12	10	9
$10,000 - $14,999	42	21	13	11	12
$15,000 - $19,999	37	24	17	10	12
$20,000 & over	39	16	18	14	13
Age:					
18 - 24	36	20	14	19	11
25 - 39	38	20	17	15	9
40 - 59	32	27	19	8	12
60 & over	37	30	12	5	15
Region:					
North East	36	25	15	14	9
North Central	37	20	16	9	16
South	29	32	13	12	12
West	43	14	22	13	8
Occupation:					
White collar	38	17	19	12	12
Blue collar	36	22	16	14	12

In another R.H. Bruskin survey done for Daily News Record (June 10, 1980) 1,300 men were asked what was the most they would pay for a suit. The results indicated that two-thirds of all men surveyed would pay $150 or less. There were several significant changes in this survey when it was compared to the responses of a similar group of men asked the identical question in July 1978.

Overall, the number of men who said they would pay less than $100 for a suit declined seven percentage points—from 38% of all men in 1978 to 31% in the current survey. The number of men willing to pay $150—$200 rose six percentage points between 1978 and 1980, to 21% of all men surveyed. A modest three point gain was found in the number of respondents spending $200 or more, rising from 6% in 1978 to 9% in the current sample.

Men's Expectations of Their Next Suit Purchase Price

	Under $100	$101 - $149	$150 - $200	Over $200
Total, all respondents*	31%	35%	21%	9%
Income:				
Under $10,000	50	35	9	4
$10,000 - $14,999	38	35	17	6
$15,000 - $19,999	30	41	21	6
$20,000 & over	18	33	31	15
Region:				
North East	21	49	22	7
North Central	33	32	24	8
South	40	32	16	9
West	28	27	25	15
Occupation:				
White collar	18	32	33	16
Blue collar	32	39	19	7
Education:				
High school grads.	31	41	19	7
College grads.	16	30	35	15

*Does not include 4% that answered "don't know."

The results of another R.H. Bruskin/Daily News Record poll (December 18, 1979) on whether men hold off purchases of men's wear in anticipation of a sale are reported below.

"Do you hold back your purchases of men's wear until stores run a sale"

	Always	Sometimes	Seldom/Never
Total, all respondents	15.3%	41.0%	42.3%
Income:			
Under $10,000	21.8	34.6	42.3
$10,000 - $14,999	13.8	46.3	38.4
$15,000 - $19,999	12.7	40.9	44.2
$20,000 & over	12.4	43.3	43.4
Age:			
18 - 24	10.9	43.7	44.5
25 - 39	14.9	42.8	41.3
40 - 59	14.6	42.9	40.2
60 & over	19.7	34.6	43.8

(continued)

"Do you hold back purchases of men's wear until stores run a sale"

	Always	Sometimes	Seldom/Never
Region:			
North East	10.7%	47.0%	40.7%
North Central	17.8	42.9	38.5
South	16.8	40.9	39.9
West	15.1	28.8	55.2

Note: Percentages may not add up to 100.0% due to rounding and the exclusion of "Don't know/No answer" responses in the surveys.

Data on purchases of specific types of men's wear, shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., of Floral Park, N.Y. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for men includes family members 17 years old and over.)

Suits

According to NPD data suits of polyester accounted for over 60% of total unit sales in 1980, up from 59% in 1978. The greatest amount of unit volume was in the $60.00 - $99.99 price range. Analysts report that an average of 59% of all men's suits are sold at off price.

Percent of Men's Suit Purchases by Fiber Content

	1980		1978
	Units	Dollars	Units
Total Units	100.0%	100.0%	100.0%
Polyester & polyester blends	60.7	50.0	59.0
Wool & wool blends	17.9	25.0	10.0
Cotton & cotton blends	2.0	2.7	5.0
All other material	19.4	22.3	26.0

Source: NPD Research, Inc.

Percent of Men's Suit Purchases by Price Point

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Less than $60.00	27.2	11.5
$60.00 - $99.99	33.3	27.4
$100.00 - $139.99	21.7	25.9
$140.00 - $179.99	10.0	16.1
$180.00 & over	7.8	18.9

(continued)

CONSUMER BUYING HABITS

Suits

Percent of Years Total Suit Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	11.9	9.4	5.9	11.8	7.8	7.4	7.3	8.7	6.3	6.1	8.5	8.9
Dollars	100.0%	12.0	7.5	7.9	10.4	7.1	7.8	6.5	8.0	6.8	6.5	11.0	8.7

Source: NPD Research, Inc.

Men's specialty stores clearly dominate the suit market, accounting for over 14% of the total dollar volume reported in the NPD survey covering 1980 purchases and nearly 40% of the units. These figures are down from the 51.2% of dollar expenditures and 43.4% of units reported in 1978. Department stores were the second most important outlet and picked up some ground versus 1978 results. National chains also picked up sales share accounting for over 20% of reported unit purchases of men's suits last year—up from 17.1% in 1978.

Percent of Men's Suit Purchases by Type of Outlet

	1980		1978	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	39.8	47.1	43.1	51.2
Department stores	25.6	26.9	24.4	24.3
National chains	20.9	14.2	17.1	12.5
Discount stores	5.7	5.4	7.5	5.2
All other outlets	8.0	6.5	7.9	6.8

Source: NPD Research, Inc.

Sport Coats

As measured by NPD Research, Inc., based on the purchase diaries maintained by panel households, the total market for men's sport coats amounted to over 7.6 million units in 1980.

Breakdowns of purchases based on panel data covering fiber content, price point, outlet type, etc., are shown on the following charts.

Percent of Men's Sport Coat Purchases by Fiber Content

	1980		1978
	Units	Dollars	Units
Total units	100.0%	100.0%	100.0%
Polyester & polyester blends	55.7	43.1	55.0
Wool & wool blends	20.9	29.2	13.0
Cotton & cotton blends	4.6	4.5	7.0
All other materials	18.8	21.2	25.0

(continued)

Sport Coats

Percent of Men's Sport Coat Purchases by Price Point

	1980	
	Units	Dollars
Total Units	100.0%	100.0%
Less than $20.00	10.8	2.7
$20.00 - $39.99	28.1	15.1
$40.00 - $59.99	23.4	19.9
$60.00 - $79.99	18.4	21.1
$80.00 - $119.99	10.9	17.2
$120.00 & over	8.5	24.0

Percent of Years Total Sport Coat Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	10.5	7.9	6.4	5.1	6.2	9.4	7.4	8.8	7.9	8.3	8.6	13.7
Dollars	100.0%	11.3	8.2	6.6	4.6	5.7	9.9	5.7	7.8	7.4	7.9	9.0	16.0

Source: NPD Research, Inc.

Percent of Men's Sport Coat Purchases by Type of Outlet

	1980		1978	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	30.9	40.2	31.3	42.2
Department stores	33.6	33.1	24.4	24.6
National chains	20.9	14.1	25.2	19.7
Discount stores	6.6	4.5	10.5	6.7
All other outlets	8.0	8.0	8.6	6.8

Source: NPD Research, Inc.

Raincoats

NPD projected the total market for men's raincoats to be 705,000 units in 1980 with a retail value of about $24.5 million. These figures reflect sales of slicker-type raincoats to a large extent.

The breakdown of men's rainwear sales by fiber type indicate the variety of types included by panel members in this category.

(continued)

Raincoats

Percent of Men's Rainwear Purchases by Fiber Content

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Polyester & polyester blends	18.7	35.2
Nylon & nylon blends	21.1	14.4
Vinyl	38.0	7.1
All other	6.5	2.6
Not reported	15.7	40.7

Percent of Men's Rainwear Purchases by Price Point

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Less than $10.00	39.1	5.8
$10.00 - $29.99	32.0	16.8
$30.00 - $49.99	5.9	7.0
$50.00 - $69.99	7.4	13.9
$70.00 - $99.99	6.0	14.6
$100.00 & over	9.6	42.0

Percent of Years Total Raincoat Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	9.1	3.5	10.7	5.0	7.4	2.3	8.7	7.9	12.1	11.3	9.2	12.9
Dollars	100.0%	30.6	4.4	13.5	3.4	9.1	0.9	7.3	0.4	9.6	7.5	5.7	7.7

Percent of Men's Raincoat Purchases by Type of Outlet

	1980	
	Units	Dollars
Total sales	100.0%	100.0%
Discount stores	26.0	7.3
National chains	25.6	14.5
Department stores	18.1	15.2
Men's specialty stores	16.1	45.5
All other outlets	14.2	17.5

Source: NPD Research, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) on number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR, AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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